



USDA Foreign Agricultural Service

# GAIN Report

Global Agriculture Information Network

Template Version 2.09

Voluntary Report - public distribution

**Date:** 9/3/2004

**GAIN Report Number:** SW4012

## Sweden

### Organic Products

### Swedish Market for Organic Products

**2004**

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**Report Highlights:**

This report gives an overview of the market for organic products in Sweden and also outlines the requirements for organic food imports into Sweden. Swedish organic production and consumption and trade policy is also discussed.

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Includes PSD Changes: No  
Includes Trade Matrix: No  
Unscheduled Report  
Stockholm [SW1]  
[SW]

*TABLE OF CONTENTS*

<b>SUMMARY .....</b>	<b>3</b>
<b>SUMMARY .....</b>	<b>3</b>
<b>ESTIMATED MARKET SIZE .....</b>	<b>3</b>
<b>TRENDS IN SALES .....</b>	<b>5</b>
<b>MARKETING CHANNELS .....</b>	<b>6</b>
<b>ORGANIC FOOD SOLD TO THE HRI SECTOR.....</b>	<b>9</b>
<b>FOOD PROCESSING SECTOR .....</b>	<b>9</b>
<b>IMPORTERS/WHOLESALEERS AND RETAILERS .....</b>	<b>10</b>
<b>TARIFFS, REGULATIONS AND STANDARDS AFFECTING IMPORTS .....</b>	<b>11</b>
<b>BEST MARKET PROSPECTS FOR U.S ORGANIC PRODUCTS .....</b>	<b>13</b>
<b>SWEDISH ORGANIC PRODUCTION POLICY .....</b>	<b>13</b>
<b>ORGANIC PRODUCTION IN SWEDEN .....</b>	<b>14</b>
<b>PRICING AND COMPETITION .....</b>	<b>14</b>
<b>TRADE CONTACTS .....</b>	<b>15</b>

*SUMMARY*

The Swedish organic sector is in effect protected, although not in any official way. As an EU member state, Sweden adheres to EU import regulations. However, organic product imports are in practice restricted to KRAV certification. The organic KRAV label is extremely well-known in Sweden (93 % recognition in 2002). With regard to imports, KRAV's policy is to approve primarily products that have been certified by other bodies accredited to IFOAM. The cost of marketing an organic label that is sufficiently recognized to establish genuine consumer confidence is rather high, and the marketing of U.S. products would be facilitated if the products carry a KRAV label.

Although self-sufficiency in many types of organic products in Sweden is high, imports will continue to exist for a number of products, e.g., spices, fruit and vegetables, meat, soybeans. Also, Swedish consumers are looking more and more for processed organic products. However, the price premium for organic products is, at around 30 percent, paid substantially lower than the EU average.

Even though the market share for organic products in general is still a modest 3 percent in Sweden, organics have made important in-roads for certain commodities such as spices, eggs and milk. For these products, where organics enjoy a market share of around 40 percent, market gains are expected to continue but at a somewhat lower rate. The market share for milk is 5 percent.

The major retailers in Sweden are actively promoting organic products. Their own organic labels have gained broad recognition. The retail chains' comprehensive coverage of the whole country, combined with their vertically integrated structure (often imports, wholesale and retail trade are carried out within the same company), makes Sweden an interesting market for U.S. exporters seeking long-term stable and predictable sales. The shift towards more private-label brands will probably strengthen the major Swedish retail chains' willingness to compete not only with price (which would be rather difficult) but also through identification of their products with environmental benefits. This development is being hastened by the fact that recently some European discount price retailers (e.g. the German retail chain LIDL) have either established themselves on the Swedish market, or announced their interest in doing so in the near future.

*ESTIMATED MARKET SIZE*

Traditionally, Europe has been the world's leading market in terms of consumption of organic products. Recently, however, North America took over this market-leading position:

Consumption of organic products in 2002 (billion U.S. \$)

North America 11.8

Europe 10.5

Asia 0.4

Oceania 0.2

Latin America 0.1

Source: IFOAM 2004

In 2002, the world market for organic products was estimated at approximately U.S.\$ 23 billion at retail level, of which the Swedish market accounted for 4 billion Swedish Crowns (SEK) (or U.S.\$ 520 million). The average 2002 exchange rate was U.S.\$ = 9.72 SEK). This means that 3 percent of total Swedish food consumption consists of organic products.

Sweden has been traditionally a net importer of most major agricultural commodities. The relation between imports and exports used to be 3:1 prior to the country's EU membership. In 1995, Sweden acceded to the border-free internal market of the EU. EU membership meant a boost for Swedish exports (and production) and the gap has now been reduced to less than 2:1. Imports have, due to the border-free internal market of the EU, shifted considerably towards intra-EU trade. Accordingly, imports from third countries have decreased. The market share for U.S. food products is currently 3.75 percent. Although the degree of self-sufficiency for organic products is at a current high of 80 percent, Sweden lacks the diversity of organic products found in the U.S.

In 2002, the wholesale value of organic food totalled U.S.\$ 210 million (SEK 1,618 million), of which imports accounted for U.S.\$ 41 million (SEK 316 million). Dairy products account for more than one-third of total organic consumption.

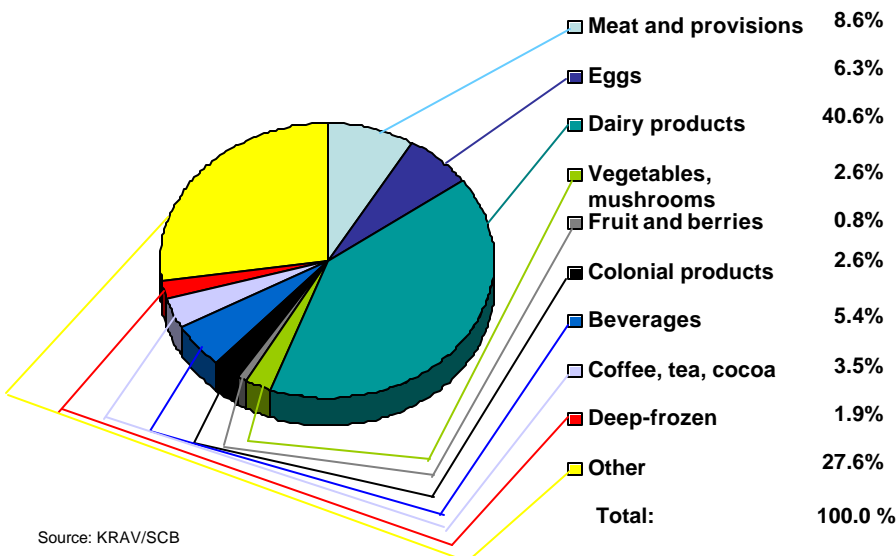
Of those commodities that are currently on the market, there is a relatively low degree of self-sufficiency in fruit, berries, vegetables and bread.

#### Processed Organic Products

Value of sales at Swedish wholesale level for organic KRAV-approved processed products 2002, in SEK	
Meat and meat preparations	110,526,356
Eggs	80,677,038
Dairy Products	522,429,638
Vegetables, mushrooms	33,580,586
Fruit and berries	10,903,858
Colonial products (e.g. spices, rice, dried fruits, peas, flour, pasta)	34,049,806
Beverages	69,352,534
Coffee, tea, cocoa	44,966,875
Deep-frozen products (including meat and vegetables)	25,094,741
Other	355,508,362
<b>All commodities</b>	<b>1,301,575,513</b>

Average 2002 exchange rate was 1 U.S.\$=9.7 SEK

### Sales value at wholesale level for various groups of organic commodities 2002



### TRENDS IN SALES

Annual per-capita consumption of organic products in some European countries, 2002 (in euros):

Switzerland	98
Denmark	50
Sweden	45
Austria	41
Germany	36
Belgium	29
France	25
UK	24
Italy	24
Netherlands	23
Greece	2

Source: IFOAM 2004

The market for organic food has grown substantially (by 20-30 percent per year) in the last ten years. In 2004, a further growth is foreseen, although notably at a somewhat lower pace than in previous years. And, as competition increases, prices are expected to fall. The variety of organic products has grown almost ten-fold since the mid 1990s.

Like most other countries with high market shares for organic products, Sweden has a national organic label with a high degree of consumer recognition: the KRAV label. According to a survey (Food in Sweden KRAV 2002) on consumer attitudes towards organic products, the main reason

for buying KRAV products is environmental concerns (74 percent), followed by animal welfare concerns (66 percent). Among the other stated reasons for choosing organic products, 50 percent of those polled believe organic food is better from a public health point of view. Forty-three percent responded that KRAV products are of superior quality compared to corresponding conventional commodities.

The more varieties of organic products an individual consumer tends to buy, the less price matters. According to a survey (Markets Facts E-nation 2002), only 51 percent of those consumers who regularly buy organic food consider these products to be too expensive. Price seems to matter to occasional buyers (63 percent of this group consider that the price is too high) and even more to those who “seldom” buy organic commodities (80 percent price aversion within this group).

*Organic food products usually cost considerably more than equivalent non-organic products. However, a key constituency of about 6 percent of the population seems to be prepared to pay the premium price involved.*

A survey (source: the Swedish Farmers Union LRF and the Organic Farmers Association, 2001) found the following degree of consumer preference for organic foods:

- Would definitely choose an organic product	6 %
- Likely to choose	15 %
- Might choose	25%
- Does not matter	8 %
- Will not choose an organic product	45 %

According to a recent study on consumer perception, a majority of the consumers surveyed had positive attitudes towards purchasing organic foods, but few reported purchasing organic foods regularly. The most common beliefs about organic foods were that they are more expensive and that they are healthier. Choice of organic foods was related to perceived benefits for human health and to environmentally friendly behaviour. Perceived health benefits appeared to be a stronger motive for purchasing organic foods than was the concern for the environmental benefits.

### MARKETING CHANNELS

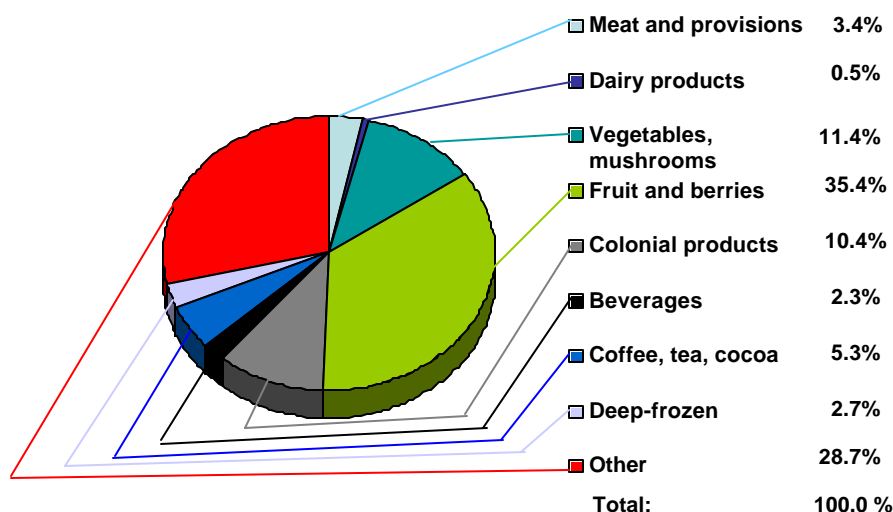
Organic products have been imported for more than a decade. Primarily, the products that are imported are not produced or available in sufficient quantity in Sweden. Organic imports are often traded through the same trade channels as non-organic products. In 2002, total imports of organic foods amounted to SEK 316 million (U.S.\$ 32.5 million). Major supplier countries were the Netherlands, Denmark, Italy, the U.S., Israel and Argentina.

## Imports of organic KRAV-certified agricultural commodities

Value of sales at Swedish wholesale level for organic KRAV-approved processed products 2002, in SEK	
Meat and meat preparations	7,896,148
Dairy Products	1,100,414
Vegetables, mushrooms	26,386,093
Fruit and berries	82,210,565
Colonial products (e.g. spices, rice, dried fruits, peas, flour, pasta)	24,195,685
Beverages	5,346,554
Coffee, tea, cocoa	12,230,395
Deep-frozen products (including meat and vegetables)	6,319,796
Other	66,584,913
<b>All commodities</b>	<b>316,024,495</b>

Average 2002 exchange rate was 1 U.S.\$=9.7 SEK

**Imports of organic KRAV-certified products at Swedish wholesale level  
Sales value 2002**



Source: KRAV/SCB

About 8 percent of the **meat** marketed is organic and most of it is produced domestically. However, small exports take place (pork chop, ham, meatballs and bacon). Some organic meat is imported, mainly from South America.

For **milk and dairy products**, the organic production and consumption in Sweden seems to be in balance. This is in contrast to neighbouring Denmark, where there is now surplus production.

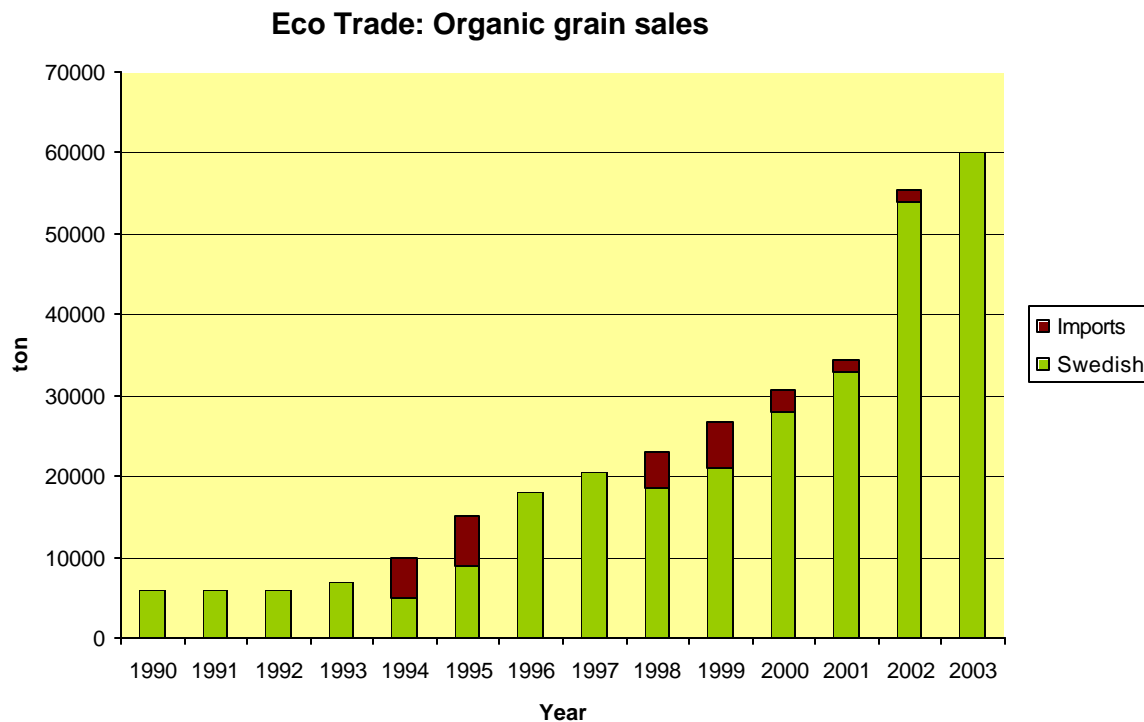
A large part of the organic **fruit and vegetables** consumed in Sweden are imported. This is especially true for fruits (where 90 % of consumption is imported) but to some degree also for vegetables (40%). Imports complement the short Swedish season, when local harvest is not enough to satisfy the market. Also, there is an increasing demand for organic products not produced within the country such as tropical fruit and coffee.

Imports of organic **soybeans** have increased since 1997, when Sweden decided to ban products extracted with petroleum-based chemicals, like hexane, in organic feed. In 1998, imports of soybeans amounted to 700 metric tons. In 1999, imports doubled to 1,500 metric tons and remained at that level the following year. In 2001, imports again doubled and thereafter imports have stabilized at an annual level of 3,000 metric tons. The supplying countries have been the U.S, Argentina and Italy. In recent years, U.S. products have been considered not to be price-competitive.

Some Swedish food processors export organic products such as crisp bread, oat milk and marmalade. Sweden also exports organic oats to the U.S. market. In late 2003, Sweden shipped 6,500 metric tons of organic oats to the U.S.

For trade in organic grains, Eco Trade, a Swedish farmers cooperative, is the principal exporter and importer. The diagram below illustrates the relationship between imported and Swedish-produced organic grains sold in the Swedish market. The significant quantities produced exclusively for animal feed purposes (and thus not traded on the market) are not included in the diagram. Since 1996, Sweden has also been active in the international cereals market also as an exporter. While exported quantities have varied greatly from year to year, Sweden has now become a net exporter of organic grains.





Source Eco Trade 2004

### *ORGANIC FOOD SOLD TO THE HRI SECTOR*

The number of Swedish restaurants having received KRAV authorization amounted to 270 in 2003, which meant a slight decline from the 2002 all time high of 298 restaurants. Today, all train restaurants serve ecologically-certified meals, a major hotel chain serves organic coffee exclusively and McDonald's serves organic milk. Approximately 20 percent of all milk being served to school children is organic.

### *FOOD PROCESSING SECTOR*

Some years ago, all organic grains harvested in Sweden had to be used as animal feed. Today, however, half of the Swedish organic grain production goes into food industry products. This is a much higher percentage than for conventional grains.

Organic food production in Sweden has developed beyond primary products like fruit and vegetables and processed products such as milk, flour and bread, to more highly processed products such as cheese, baby food, ice cream, meatballs and jam. In the near future, it is likely that the processing industry will be willing and able and willing to further develop the processing and marketing of organic products to satisfy consumer-driven demand. This development should translate into an increased demand in terms of quantity and variety for organic product inputs. Nevertheless, product diversity will still be much more limited than that which exists in the U.S.

*IMPORTERS/WHOLESALEERS AND RETAILERS*

Imported organic products are shipped to Sweden either directly from the producer country or via a third country. The two main distribution channels for organic foods are the large retail groups and the specialized organic importers. There are also a few large importers of both conventional and organic products, especially in the fresh fruit and vegetables and coffee trade. Retail chains buy imported organic products both directly and through local importers.

A range of organic food products is now to be found in virtually every Swedish grocery store, and most retail chain stores offer fresh produce carrying the KRAV label. In some cases, stores have made certified organic food their competitive edge. Increasingly, an ecological profile is being viewed in the Swedish food retail trade as being not only potentially profitable, but possibly essential to the survival of their business in the long-term.

Three large retail groups-- ICA, Coop and Axfood -- dominate the distribution of food in Sweden. Together these three account for over 70 percent of the domestic food market. Unlike many of their European competitors, the Swedish retailers handle most of import and wholesale activities within their own companies. All three trading groups are also engaged in joint Scandinavian purchasing groups. In 2001, seventy-three percent of all organic food was sold through the retailers. This can be contrasted with Germany, where only thirty-three percent was sold through the food retailers because such a high percentage is sold through specialized distributors (health shops) instead. Organic food products are also imported by a relatively large number of specialized organic importers. Seven percent of the organic food produced in Sweden is sold directly at farm-gate level.

COOP, with its 1,000 food stores, has the highest profile when it comes to promoting organic products. COOP is also the predominant seller. Approximately 40 percent of all organic products consumed in Sweden are sold at Coop stores. In 2002, COOP's sales of organic products increased by 24 percent. COOP's environmental policy states that at least 10 percent of all sales should consist of organic products. Among the various business units within the Coop retail chain, Coop Konsum is the one most specialized in marketing and promoting environmentally friendly products. For example, 40 percent of all eggs sold at Coop Konsum are organic. To put this in perspective, a total of 6 percent of all eggs marketed at the wholesale level in Sweden are organic. Overall, COOP accounts for about 20 percent of total sales of all product types within the Swedish grocery retailing trade.

Second to Coop in organic sales is ICA. ICA is the largest retail chain with regard to total sales (organic as well as conventional). With its 2,000 supermarkets and 100 hypermarkets, ICA has a market share around 35 percent. Moreover, it is also active in Norway and the Baltic countries. ICA's goal in organic products is to have all product categories include at least one organic product. This objective points to opportunities for U.S. suppliers. Presently, 38 percent of all spices sold by ICA are organic.

Axfood is a joint venture between the wholesaling and retailing group Axel Johnson, and independent retailers in Sweden and Finland. One of Axfood's three main retail chains is

Hemköp, which has 100 large supermarkets all over Sweden. Hemköp has an organic range of some 300 articles. About 3-4 percent of total food sales are believed to be organic.

For several years now, both COOP and the merchant-owned ICA chain have had their own organic brands on the shelves: COOP's Änglamark brand and ICA's Sunda brand.

#### *TARIFFS, REGULATIONS AND STANDARDS AFFECTING IMPORTS*

The EU rules governing imports and production of organic products are fully applicable to the Swedish market.

*Swedish food and agricultural import regulations and standards are described in detail in USDA FAS GAIN Report number SW4009.*

Import duties and other levies do not differ between organic and conventional products. The VAT rate for all foodstuffs is 12 percent in Sweden. A higher rate of 25 percent applies to alcoholic beverages.

Wrapping and packaging materials may not contain preservatives, fungicides or other chemical agents. All wrapping materials should be environmentally friendly (choice of material, color for printing, etc).

Also, basic standards and food labeling requirements are the same, although organic production is subject to some more far-reaching certification rules. These specific requirements have been laid down in Council regulation 2092/91 (consolidated text, as last amended May 2004) and are thus equally applicable in all EU countries. In practice, however, the EU minimum rules are shadowed by stricter national standards applied on a voluntary basis (as is the case with the KRAV certification in Sweden).

KRAV certification is associated with consumer confidence in organic products sold on the Swedish market, whether they are domestically produced or imported. Importers who have an import license issued by KRAV or IFOAM may import products and sell them as KRAV-certified. KRAV is accredited by IFOAM (International Federation of Organic Agriculture Movements). IFOAM is a worldwide movement for organic agriculture and a platform for global exchange and cooperation. IFOAM sets standards for organic production and criteria for accreditation of certification bodies. Together with Demeter, a certifying body for biodynamic farmers, KRAV carries out inspections according to EU Council Regulation 2092/91. Basically, the purpose of KRAV and Demeter inspection and certification is to ensure the credibility of ecological produce and guarantee ecological products throughout the food chain, from farmer to consumer. Svenska Demeterförbundet follows Demeter International Standards for bio-dynamic production. KRAV has certified/authorized approximately 3,890 commodities. Half of these are produced abroad (according to KRAV, 2004). KRAV is authorized by The Swedish National Board of Agriculture and The Swedish National Food Administration to carry out inspection of organic production in Sweden.

The KRAV label is-- according to a large consumer survey conducted in 2002-- recognised by 93 percent of the Swedish population between 16 and 70 years of age, or close to six million people.

In 2002, the number of KRAV-certified products on the market increased by 20 percent and sales in retail shops increased by 10-15 percent. KRAV is so well-known that marketing organics in Sweden would in practice be rather difficult (although of course legally possible) without its label. Nowadays, most Swedes no longer refer to “organic food” or “ecological food” but simply to “KRAV food.”

This, in effect, means that organic product imports are more or less restricted to organic products certified by an organization KRAV recognizes for certification. Only a small percentage of organic products marketed in Sweden do not carry the KRAV label. Examples of other labels on the market are the UK Soil Association and the Danish equivalent, Statskontrollerat ekologisk.

The major difference between KRAV and similar organizations outside the Nordic area is that it also embraces ecological livestock farming, taking into consideration such ethical aspects as the animals' need to live freely and naturally as far as possible. Currently, all cows in Sweden must be put out to pasture in summer and all pigs must be allowed to roam freely. Calves and pigs must have access to straw and reasonable space, and Sweden has become the first EU country to outlaw battery cages.

In order to use the name of KRAV or the KRAV mark (logo) on a product, production must be inspected and certified by KRAV. Production outside of Sweden should be certified by a certification body which KRAV has an agreement with, *preferably* an IFOAM-accredited certification body.

The KRAV label is a registered trademark. The green KRAV label must always be accompanied by the name of the producer.

### ***Imports (Re-certification)***

A product application for re-certification must be sent to KRAV together with all relevant documents/information showing that all stages of production, from the field to the finished product, have been inspected.

The application examination by KRAV includes verification that the product is certified by a certifying body with which KRAV has signed an agreement. KRAV will also make sure that the production is carried out in accordance with KRAV's standards and/or IFOAM Basic Standards. The production must also comply with Council regulation (EEC) no.2092/91 (consolidated text, as last amended May 2004).

KRAV's document review may result in a request for more information and documentation. When document examination is completed and the product is approved, KRAV will send the applicant a certificate for the product. All recipes and other documents concerning the product are treated with strict confidentiality. For more information contact KRAV at [food@krav.se](mailto:food@krav.se).

*BEST MARKET PROSPECTS FOR U.S ORGANIC PRODUCTS*

There is an increasing market in Sweden for imported organic products. Clearly, business opportunities to export organic commodities that are not produced in Sweden, e.g., wine, certain fruit and vegetables, and beans, exist. Market opportunities for organic corn for use in the food processing industry (e.g., TexMex foods, a Swedish export profile), meat, cheese and rice also exist. The demand for rice is currently one of the most rapidly expanding among food products in Sweden. Moreover, there is a growing demand for organic oils (mostly soy oil, sunflower oil and rapeseed oil) for the domestic oils and fats industry. In addition, organic oilseeds such as rapeseed and soybeans are imported.

Since domestic supply of organic honey is not sufficient, there is a potential for increased imports, especially for honey flavors not produced within the country, such as orange honey. Organic vinegar is another product for which sales have increased. Per capita consumption of herbs and spices in Sweden is among the highest in Europe. Additionally, the domestic food industry consumes an increasing amount of herbs and spices. The Swedish market presents an obvious potential for exporters of organic herbs and spices.

In the long run, the best market opportunities will be provided for high-value processed food. While U.S. exporters will have to meet this growing demand in competition with the domestic food industry as well as the food industry in the enlarged EU, the wide range of organic products produced in the U.S. today gives the U.S. some advantages and opportunities in this market if it is seriously explored. High-value products which cater to the rapidly increasing market for convenience and ethnic foods have the potential to do well in this market.

*SWEDISH ORGANIC PRODUCTION POLICY*

Environmental supports, partly financed by the EU, provide financial support to farmers for organic production. The Swedish government has actively promoted organic farming and has set ambitious goals for the share of arable land to be devoted to organic production. A few years ago, the objective was set at 10 percent by the year 2000. This objective was achieved in 1999. The present objective is that 20 percent of arable land and 10 percent of dairy cows, cattle and lamb be organically produced by 2005. At present, almost 17 percent of arable land in Sweden and 10 percent of milk and meat is produced organically. These figures are much higher than the average in the European Union. Currently, the Swedish government is considering new production objectives for 2010. Production supports for organic cereal products in Sweden currently average about 40-50 percent of the income farmers receive for their products. For beef, supports average 60-70 percent.

Due to the fact that the organic acreage comprises pasture and feed crops not immediately connected with the ecological food market, the increase in organic farmland has not resulted in a corresponding increase in organic food production.

With regard to imported products, Sweden is a staunch advocate of free trade. The Swedish National Board of Trade recently carried out a study which showed that EU regulations set up

unnecessary barriers to trade. In this context, Sweden is striving to exert influence to assure that the Commission proposal for an EU action plan for organic farming becomes an important tool for facilitating and promoting trade with third countries and within the EU. The action plan aims at establishing the bottlenecks with regard to the processes of producing and marketing organic farming products.

### *ORGANIC PRODUCTION IN SWEDEN*

In terms of percentage of total agricultural land used for organic farming, Sweden is now second only to Austria. As mentioned above, organic products' share of total consumption is considerably lower than their share of total production. At present, only 40 percent of arable land devoted to organic is connected to KRAV, the organic certifier in Sweden. Also, Swedish implementation of EU agricultural policy gives individual farmers an incentive to produce organically, even if their products are not sold and labeled as organic. This policy allows farmers to maximise the subsidies they receive for environmentally friendly farming while avoiding the costs and demands related to the organic certification process.

The key challenge in Sweden is to increase the extent to which organic production is eventually marketed as organic products. For example, although the demand for organically-produced meat is strong, producers of organic meat face problems in reaching the market (only 60-80 percent of organic beef production is marketed as organic). These problems stem from the fact that the demand for organic meat varies substantially between different types of cuts. For this reason, the Swedish Farmers Union has encouraged the establishment of a website functioning as a marketplace between farmers and their potential customers. For other products, progress has been made. Organic wheat flour from the major mills has been available since the mid eighties. The market-leading crisp bread manufacturer started producing organic crisp bread in the early nineties. Almost all coffee roasters are marketing organic coffee. Organic production is growing slowly but steadily in the fruit and vegetable sector as percentage of total production. The share of area devoted for organic production of horticultural products in greenhouses and the field increased from 5.2 percent in 1999 to 7.3 percent in 2002.

### *PRICING AND COMPETITION*

As is true in the rest of the world, Swedish consumers have to pay higher prices for organic products than for conventional ones. However, this additional cost is relatively low in Sweden. On average, the price difference between organic and conventional products amounts to 44 percent. In Germany, the corresponding difference is a significantly higher 70 percent. It has recently been confirmed that Swedish consumers pay less than in the rest of the EU for organic foods. The EU Organic Marketing Initiative and Rural Development compared the prices of 28 organic commodities. In fact, Sweden, in most cases, had the lowest prices at the retail level. In those cases where Sweden's prices were not the lowest ones, its prices were well below the EU average. Examples of Sweden's lowest organic food prices include ground beef at euro 6.61 per kilo compared to the EU average of euro 9.7 per kilo. Another example is milk where Sweden's price per kilo is euro 0.79. Organically grown onions are 20 percent cheaper than the EU average. Favourably compared with the EU average of euro 1.04 per kilo.

The difference in the retail price of organic and conventional food is less in Sweden than the EU average. In 2002, when the Swedish state consumer authority, Konsumentverket, bought 15 types of organic and conventional staple foods from 29 selected shops, it found that the price difference between organic and conventional products was a little more than 30 percent.

Generally, the price premium is lower for processed products. For some agricultural products, especially milk, producer prices are linked to conventional prices, with a premium fixed either in Swedish crowns or as a percentage. For certain products, such as grains, most of the production is contracted in advance at an agreed price. For other products, notably vegetables and fruit, prices fluctuate considerably as they do for conventional products.

#### *TRADE CONTACTS*

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